

MARKET WRAP UP

- Trading for the week ended on a positive note as key indices posted decent gains and scaled fresh record high levels, tracking strength in global equity markets on the back of robust economic data. The S&P BSE Sensex, rose 184.21 points or 0.54% to settle at 34,153.85. The Nifty 50 index rose 54.05 points or 0.51% to settle at 10,558.85. The Sensex regained psychological 34,000-mark.
- The BSE Mid-Cap index rose 0.69%. The BSE Small-Cap index gained 0.97%. On BSE, 1,713 shares rose and 1,223 shares fell. A total of 127 shares were unchanged.

DERIVATIVES WATCH

- Nifty January series futures witnessed a fresh long position build up. Open Interest has been increased by 19959 contracts at the end of the day.
- Long position build up for the January series has been witnessed in RELIANCE, HDFCBANK.
- Short position build up for the January series has been witnessed in SBIN, ICICIBANK, INFY.
- Unwinding of position for the January series has been witnessed in EICHERMOT, VEDL.

CORPORATE NEWS

- L&T Hydrocarbon Engineering** has secured a Rs 14.83 billion offshore contract from **ONGC**.
- Bharti Airtel** and device manufacturer **itel** announced their partnership to launch budget friendly 4G smartphones.
- State Bank of India** may reduce its minimum balance requirement to Rs 1,000 from the current Rs 3,000 balance in metros.
- Fortis Healthcare Ltd.** is seeking a cash injection of as much as Fortis in talks for fresh capital of Rs 50 billion as part of Singhs' stake sales part of its billionaire founders' talks to sell their stake in India's second-largest private hospital chain.
- GTL Infrastructure** expects to recover Rs 2,000 crore as rental cancellation charges from Aircel, Reliance Communications and Tata Teleservices as a result of consolidation in the industry.
- Force Motors Limited (FML)** reported total sales of 1,921 vehicles in December 2017 against 2,310 vehicles in December 2016, a decline of 17% yoy.
- Infosys** announced that it has been selected by Proximus, the largest telecommunications company in Belgium, to implement Excite - a business transformation program aimed at delivering superior digital customer experiences for its enterprise clients.
- Infosys** announced a new partnership with paperless validation company ValGenesis, that will bring even stronger compliance and quality management for its customers in the healthcare and life sciences sectors.
- Ahluwalia Contracts India** bagged orders worth Rs395.2cr. The first order, worth Rs314.7cr, is for the construction of a 2,400-seater indoor auditorium at Alipore in Kolkata. The second order, worth Rs80.54cr, is for civil and allied works in Noida.
- Exide Industries Limited** launched a new range of automotive batteries in India, Epiq. The battery comes with a 6-year warranty, the highest offered in the Indian market till date.
- Greaves Cotton** has signed an agreement with Piaggio Vehicles India to develop new diesel and clean energy engines.
- Varun Beverages** has entered into an agreement with PepsiCo India to distribute its fruit juice brand - Tropicana, its sports drink - Gatorade and Quaker Value-Added Dairy products in VBL's territories.

INDEX CHART



GLOBAL NEWS

- U.S. initial jobless claims edged up to 250,000 in the week ended December 30th, an increase of 3,000 from the previous week's revised level of 247,000. Continuing claims fell by 37,000 to 1.914 million in the week ended December 23rd.
- U.S. seasonally adjusted final IHS Markit Services Business Activity Index registered 53.7 in December, down from 54.5 in November. The final seasonally adjusted IHS Markit U.S. Composite PMI Output Index fell to 54.1 in December, down from 54.5 in November.
- U.S. ADP said employment in the private sector surged up by 250,000 jobs in December after climbing by a downwardly revised 185,000 jobs in November.
- France's composite PMI fell to 59.6 from 60.3 in November. Similarly, the final services PMI slid to 59.1 from 60.4 a month ago.
- Germany's retail sales climbed 4.4% year-on-year in November, reversing a revised 0.9% drop in October. On a monthly basis, retail turnover advanced 2.3%, in contrast to October's 1% decrease.
- Germany's composite PMI climbed to an 80-month high of 58.9 from 57.3 in the previous month. At the same time, the services PMI improved to 55.8, from 54.3 in November.

ECONOMIC NEWS

- Crude Oil traded at US\$ 61.77/bbl (IST 17:00).
- INR strengthened to Rs. 63.37 from Rs. 63.40 against each US\$ resulting in daily change of 0.06%.
- The fast moving consumer goods (FMCG) sector in India grew by nine per cent between December 2016 and November 2017.
- The Union Budget would be presented on February 1 this year as well, Parliamentary Affairs Minister Ananth Kumar informed. He also said that first part of the budget session would take place from January 29 to February 9.
- The government may impose antidumping duty for three years on a chemical mainly used in rubber industry and imported from China and Japan.

DAILY ROUND-UP

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FORTHCOMING EVENT

BOARD MEETINGS AS ON 06/01/2018

- Goa Carbon Limited Results/Dividend
- Value Industries Limited Results

BOARD MEETINGS AS ON 08/01/2018

- Aarti Drugs Limited Buyback
- Prakash Industries Limited Results
- SJVN Limited Buyback
- Unichem Laboratories Limited Results/Buyback
- Venus Remedies Limited Qualified Institutional Placement

Indian Markets

Indices	Close	Previous	Change (%)
NIFTY 50	10558.85	10504.80	0.51%
S&P BSE SENSEX	34153.85	33969.64	0.54%
NIFTY MID100 FREE	21499.85	21308.35	0.90%
NIFTY SML100 FREE	9398.70	9310.00	0.95%

Exchange Turnover

Market	Current	Previous
NSE Cash	38342.91	36892.63
NSE F&O	366336.71	1036180.25

Previous FII Positions (IN CRORE)

ACTIVITIES	Cash	F&O
NET BUY	212.05	451.81
NET SELL	-	-

Sectoral Indices

Indices	Close	Previous	Change (%)
BSE BANKEX	28936.87	28777.47	0.55%
BSE IT	11195.73	11157.29	0.34%
BSE CG	19886.22	19805.57	0.41%
BSE OIL & GAS	16160.03	16223.36	-0.39%
BSE FMCG	10713.30	10635.05	0.74%
BSE AUTO	26550.03	26390.38	0.60%
BSE HC	14910.88	14818.69	0.62%
BSE POWER	2429.24	2420.70	0.35%
BSE METAL	15650.33	15578.33	0.46%

Top Gainers

SCRIP NAME	Close	Previous	Change (%)
YESBANK	332.85	317.10	4.97%
BAJFINANCE	1814.50	1754.00	3.45%
ADANI PORTS	423.80	409.85	3.40%
BHARTIARTL	540.00	523.00	3.25%
INDUSINDBK	1698.20	1646.60	3.13%

Asia Pacific Markets

Indices	Close	Previous	Change (%)
Nikkei225	23714.53	23506.33	0.89%
HangSeng	30814.64	30736.48	0.25%
Straits Times	3489.45	3501.16	-0.33%
Shanghai	3391.75	3385.71	0.18%
Kospi	2497.52	2466.46	1.26%
Jakarta	6353.74	6292.32	0.98%
Taiwan	10879.80	10848.63	0.29%
KLSE Composite	1817.97	1803.45	0.81%
All Ordinaries	6228.20	6185.40	0.69%

Top Losers

SCRIP NAME	Close	Previous	Change (%)
INFRATEL	372.60	379.05	-1.70%
HINDALCO	276.40	279.80	-1.22%
UPL	774.20	781.65	-0.95%
HINDPETRO	415.00	418.85	-0.92%
IOC	383.85	387.30	-0.89%

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